Men’s cosmetics: Tapping into an untapped market.

Is your brand missing out on a huge growth opportunity?
There’s no doubt about it, there’s a serious expansion opportunity with the cosmetics space. Whether you think of these products as ‘grooming items’ or ‘enhancement solutions’, there’s a real need for beauty brands to broaden their approach and start catering for the rapidly growing male audience.

For too long, the cosmetics sector has been hyper-focused on producing beauty products for women. And with women in the US spending up to $3,756 on beauty products every year, this isn’t surprising.

But, some brands are making moves towards men. Boy De Chanel focuses on expression and identity and have produced a variety of makeup ranges to suit the modern man. And more recently, we’re seeing celebrity icons, like Harry Styles, jump onboard - launching the gender-neutral makeup brand, Pleasing.

Even with a multitude of innovation happening within the space, this sector is still nascent and there’s a lot of learning for these brands to do before they can truly get into the mindset of this new audience. It’s time for creativity and bold thinking as we begin to reimagine and reconceptualize what it is that men want from these brands and products.

- Will men be motivated more by skin restoratives or anti-aging preventative?
- What kinds of cosmetics will these men be open to trying?
- How can brands reduce the barrier of entry for men, drive repeat purchase and grow penetration within this segment?

There won’t be a one-size-fits-all approach but only by really understanding the mindset of men and tapping into the different pain points of this audience, will brands be able to create products to grow category value.

From 2020-2028, the men’s personal care industry is projected to increase at a CAGR (Compound Annual Growth Rate) of **6.1%**.

The men’s skincare category is currently valued at **$122M**.

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1. Digital Journal, February 2022
2. NPD Group
In this guide, we’ll explore:

- The differences between the male and female mindset within the cosmetics category to understand what motivates buying behavior
- Which brands are performing the best with men and women, and what they’re doing to attract attention
- Strategies to position your brand in the best place to win within this space

Every inter-personal relationship is driven by fundamental human-conditions - like whether we relate to how a person conducts themselves, whether we think they understand our needs, if we find them transparent and whether we feel they do the right thing.

The relationship between consumers and brands in the cosmetics category is no different.

In fact, there are 16 different factors that determine this relationship. We’ll refer to these as the 16 Drivers of Brand Relationships and they are responsible for establishing the strength of a relationship between brands and people. These Relationship Drivers help brands to understand exactly where their relationship with consumers is strong and where it needs improvement, so they can create strategies that are geared for growth.

Understanding which Drivers are expected within your category and for your consumers is imperative for brand success. It might be that consumers expect products to be Attractive and Aspirational, or perhaps they’re looking for brands that really understand their wants and needs (Empathy) or are good Value for Money.

Either way, you can use these Drivers to guide your strategy and to ensure you’re optimizing the relationship your brand has with people. For more information on these Drivers, we’ve included a Dictionary with definitions at the end of the report.
We first asked consumers:
If you could enhance a physical feature on your face using cosmetics. What would it be and why?

Females in the US responded:
- Eyes: 31%
- Cheeks/cheekbones: 10%
- Skin: 9%
- Lips: 9%
- Nose: 9%

Males in the US responded:
- Nothing: 28%
- Skin: 14%
- Eyes: 12%

Looking into these trends
When comparing female vs. male response to Question 1, we see a wider variety of options listed for women. This could suggest that women are clearer about the available benefits of products within this category, as they have listed multiple uses cases, or it could suggest they have a wider frame of reference having previously used these products more frequently.

The overwhelming winner in the female category is ‘eyes’. There was a range of different reasons for this, with responses like ‘brighter eyes’, ‘removal of under eye circles’ and ‘more defined eyes’ as an explanation behind this choice. But ‘fuller lips’ and more ‘visible’ cheekbones were also common within these responses.

When it came to men, we saw a difference in how they viewed these products. Most voted for ‘nothing’ – indicating they do not use these products to change or enhance physical features. Instead, they see the value of these products in more functional terms as a way of improving skin or reducing the look of tiredness.

Here we can see a fundamental difference between the genders, as men approach these products from a more restorative perspective to help with existing problems, whereas women appear to use these products as more of a preventative measure to prevent aging, acne, and more.

For Question 2, we can see women are more concerned about the application process of these products, whereas for men the biggest concern is ‘looking natural’. Both are cautious about color matching and skin breakouts but for women they are more worried about ‘looking cakey’ or ‘powdery’, whereas men are more worried about the visible look of ‘oilyness’.

Then, we asked consumers:
What makes you self-conscious when using a cosmetic product?

Females in the US responded:
- Uncertainty on correct usage: 13%
- Color-matching: 10%
- Wrinkles: 9%
- Looking ‘cakey’: 8%
- Skin breakouts: 6%

Males in the US responded:
- Looking unnatural: 20%
- Color-matching: 10%
- Oilyness on skin: 15%
- Skin breakouts: 5%
The most expected needs in the category differ across genders. **Women** have more of an emotional expectation of the category with **Attraction**, high **Performance** and a brand’s **Popularity** being table-stakes. The more rational driver of **Accessibility** also is amongst the most expected category Drivers, reinforcing the idea that women value products with an easy application process.

For **Men**, their expectations with the category are quite the opposite. They expect the category to be more rational via Drivers like **Accessibility**, **Familiarity** and **Consistency**. The emotional Driver of **Aspiration** is also among the most expected. It might be that because the category is still nascent, it needs to try harder to be more niche, premium and desirable to entice more people to dip their toes into the market.

Comparing the expectations of **Men & Women** in the Cosmetics category:

Both men and women place importance on the user experience of these products with **Accessibility** being amongst the top 4 most expected Drivers. Clearly, products are expected to be intuitive and easy to use for consumers to buy into the routine.

The end-result of these products is incredibly important for female customers (**Performance**). They want to feel like the outcome justifies the cost and will spend more on products that do what they say they will, with visible results. They are also taken in by the look and feel of a brand, valuing **Attractive** looking products, as well as **Popular** brands.

For men, it’s most expected that these products are reliably the same each time (**Consistency**). **Popularity** isn’t as expected for males as it is for females – what’s more important is being **Familiar** with the brand itself. Yet **Aspiration** also appears here, with males expecting brands in the category to inspire them more.

**Disrupting the Cosmetics category**

For **men**, the key opportunity spaces are **Value for Money**, **Connection** and **Empathy**. We can see how important it is for these brands to be able to justify their price points, to relate and connect with consumers in a human way and to really understand the person’s wants and needs. In a category where the swing is heavily in the female’s favor, it makes sense that men don’t yet expect these brands to fully understand and empathize with their needs.

For **women**, **Transparency**, **Integrity** and **Innovation** are the opportunity spaces. Open, honest and authentic brands are the ones with the power to disrupt the status quo, as well as those that step outside the box and do things in a creative way – innovating into new formats or introducing new product benefits.
Who are these brands performing best with?
These audience segments feel most positively about each brand.

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<thead>
<tr>
<th>Brand</th>
<th>Women 21-40</th>
<th>Men 41-60</th>
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<tr>
<td><strong>Fenty</strong></td>
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Where are they winning?
Areas where consumers feel these brands excel most.

- **Fenty**: Innovation
- **Glossier**: Performance
- **KVD Beauty**: Aspiration
- **Kylie Cosmetics**: Differentiation
- **L‘Oréal**: Relevance, Accessibility

ProQuo Data, April 2022
How to grow as a cosmetics brand... with men

It’s important to fulfil category expectations first in order to compete in this space but to really make moves within the cosmetics sector, the disruption Drivers are what your brand needs to focus on.

Looking at this category, we can see the 3 biggest opportunity spaces for disruption in the men’s cosmetic sector are Value for Money, Empathy and Connection.

Value for Money is the extent to which people feel that your brand is worth the money that they are paying for it. It’s an understanding of worth. It’s not simply about price.

This Driver may be less expected within the cosmetics category because men don’t see these products as ‘essentials.’ There hasn’t been a strong enough ‘need’ established yet amongst this audience. By educating men on the importance of the everyday routine or on the occasions to use these products, this will help to cement their role within their lives.

To grow your Value for Money with men, consider some of these options:

Don’t get trapped in a price war
It’s all too easy for the conversation to become entirely about price. Buck the trend by making sure you always talk about your benefits and communicate your value in an emotional way. No matter how rational the category, there is always a place for emotion.

Create price tiers to entice a wider range of consumers
Consider launching new products at new prices – either in bigger sizes or smaller sizes, or with more or less features – to allow your brand to play across multiple price tiers. The key here is to make sure you always meet real consumer needs through innovation and cautiously adapt price as benefits are added to products. Importantly, like with every relationship, the added benefit must outweigh the added cost.

To gain mass appeal, make your product more mainstream
Often it can be tempting for cosmetics brands to go down the Aspirational route, creating a product that exudes prestige and exclusivity. Yet, to increase Value for Money, you may have to take a hit on Aspiration. A product that is readily available to the masses will sell more but it won’t be seen as Aspirational.
**Empathy** is all about the extent to which a brand understands a person’s wants and needs.

This Driver may be less expected amongst men as the category has been heavily focused on the needs of its female usership for a long time. As the market expands and moves towards men, more of an effort will need to be made by these brands to get into the mindset of this audience segment.

To grow your **Empathy** with men, consider some of these options:

**Using packaging to show you understand your audience**
Including your core product benefits on front-of-pack and tweaking these to align with the key pain-points of your audience, will help to show you understand this group. It will also boost the clarity of your messaging. Successful products, at their core, are built off real consumer needs. Make sure the language you use in your communications addresses what these men are struggling with most, to demonstrate your value.

**Drive trial through holidays, occasions and gifting**
Show you ‘get’ men by offering discounts and promotions at a time of year that suits them. Creating a promotion for a moustache gel during a time like Movember, when many people are growing moustaches for the first time, will show you are in tune with the needs of your audience. However, often these products are bought for men by females – particularly for gifting – so to really grasp empathy, brands will need to communicate in a way that doesn’t alienate either men or women.

**Is your packaging the right format?**
It might be that men will use these products on-the-go more than at home. If that’s the case, is there anything you can do to make your packaging reflect this need? Perhaps by creating an additional travel sized container or including a case? We know that men are looking for a ‘natural look’ from our data above. Knowing this, as a marketer, will enable you to tailor your marketing in this direction – referencing this through product visuals, talent selection and language.

**Connection** is all about how a brand behaves and whether consumers can relate to it. This is less about your innate proposition and much more influenceable by your brand’s responses and actions.

This Driver may be less expected amongst men, as the ‘culture’ around cosmetics isn’t as established within this demographic as it is with women. To make these products seem more relatable to men, more work needs to be done on embedding them into their lives – whether that be inserting them into spaces where men interact or focusing more on the brand ambassadors that are communicating this message.

To grow your **Connection** with men, consider some of these options:

**Focus your brand’s emotional benefits in real consumer pain-points**
People tend to latch onto the more emotional benefits of a brand. Giving men a reason to use you beyond the rational, product-led reasons to believe is a starting point for Connection. When looking at what this benefit should be for your brand, explore how men feel when using your product and transform their biggest pain-point into a gain moment to motivate purchase.

**Optimize your Channel Strategy to connect with your consumers**
Creating a brand that’s relatable, or one that people feel ‘gets them’ means slotting directly into their lifestyles. Consider moments where your brand might be needed most and determine whether there are distribution opportunities to be available in those moments. Think about ‘alternative’ channels you can use to create a need for your product. In men’s bathrooms, cologne is often provided. Being available in that moment of need is the easiest way to establish why people should buy your product.

**Target your communication so it’s relatable**
Some men are finding it difficult to relate to these brands because of the history of the category, which has predominantly been focused on women. Ensure your instructions, messaging and brand ambassadors are as targeted as possible to connect your brand with this group. This will help to make them feel like your products are really ‘made for men.’
We first asked consumers:
If you could enhance a physical feature on your face using cosmetics. What would it be and why?

Females in the UK responded:
- Eyes: 31%
- Skin: 23%
- Lips: 8%
- Nothing: 5%

Males in the UK responded:
- Nothing: 28%
- Skin: 25%
- Eyes: 16%
- Nose: 10%

Looking into these trends

When comparing the responses for Question 1, we can see females are most interested in enhancing their eyes, whereas the largest proportion of men did not want to noticeably enhance or change any of their physical features.

Both groups share a commonality as ‘skin’ was listed as the second most dominant concern. Yet, in the male group we saw comments like, ‘wanting skin to look fresh and healthy’ and wanting to decrease ‘wrinkles’, whereas motivations differed in the female group where comments on skin revolved around acne and pigmentation.

A small section of the male group voted for ‘eyes’ – with comments centered around ‘under-eye circles’ and wanting ‘eyes to look more defined’. The ‘nose’ was also mentioned, with many wanting to reduce the size of this feature with beauty products. This contrasted with the female response, where more women were concerned with the ‘thinness’ of their lips.

For Question 2, we can see a large portion of the male demographic aren’t concerned about using these products. This suggests they will be open-minded, if presented with the right product and brand proposition. For women, the biggest concern is using these products correctly, indicating that tutorials and clearer instructions on packaging may be valued by this group. Men are concerned by the visibility of these products and are worried people will notice they are wearing a cosmetic, whereas women are concerned about color matching and looking natural.

Then, we asked consumers:
What makes you self-conscious when using a cosmetic product?

Females in the UK responded:
- Skin breakouts: 8%
- Uncertainty on correct usage: 30%
- Looking unnatural: 12%

Males in the UK responded:
- Nothing: 30%
- Oilyness on skin: 10%
- People noticing they are wearing makeup: 20%
Deep dive.

Category expectations of Cosmetics

For men, their expectations with the category are more rational – preferring Performance, Familiarity and Consistency. They value high-performing products, from well-known brands, with a user-experience that is reliably the same on each use. Yet, the emotional Driver of Attraction is also present here, showing that men are similar to women in being taken in by the packaging of a brand, expecting products that are aesthetically pleasing on the outside.

For women, expect the category to be emotionally driven, favoring Attractive products from Popular brands. But they also expect some of the rational Drivers to be present, in particular Familiarity and Accessibility. This conveys the preference that these products should be easy to use and come from a well-known and reliable source.

Disrupting the Cosmetics category

For men, the key opportunity spaces are Relevance, Value for Money and Connection. Here we can see how important it is for these brands to be able to justify their price points, to be relatable, and to be on the pulse with the latest pain-points, trends or consumer needs.

For women, Differentiation, Value for Money and Integrity are the clear opportunity spaces. Brands that do things differently, justify their cost well and act in a morally conscientious way, are the ones best positioned to disrupt.
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Where are they winning?
Areas where consumers feel these brands excel most.

- Familiarity
- Clarity
- Aspiration
- Performance
- Transparency
- Relevance

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How to grow as a cosmetics brand... with men

It’s important to fulfill category expectations first in order to compete in this space but to really make moves within the cosmetics sector, the disruption Drivers are what your brand needs to focus on.

Looking at this category, we can see the 3 biggest opportunity spaces for disruption in the men’s cosmetic sector are Relevance, Value for Money and Connection.

Relevance is about providing for the wants and needs of the buyer in the most relevant way.

It might be that this Driver is less expected among men in the cosmetics category because these products aren’t thought of as ‘must-haves’. To be perceived as relevant, current and on trend, brands will have to focus on embedding themselves more into the cultural context of today, using dominant influencers and creating products that are in tune with the latest wants and needs of their audience.

To grow your Relevancy with men, consider some of these options:

How can you drive personalization at every step?
At every stage of your customer journey, you can drive Relevance by creating a more custom experience. Targeted marketing, personalized content, customized alerts, bespoke offers and interactions shaped by male product usage are all strategies you can use to drive a more Relevant customer journey and boost your engagement with men.

Uncover the male mindset
Understanding the individual wants and needs of men in the category is crucial to driving your brand’s Relevance. Connect with them through your customer feedback loop to understand the main motivations behind purchase. Consider what your key product benefit is for men specifically, and once uncovered, communicate this clearly via packaging and all advertising collateral.

Integrate yourself into the daily routine
You want to be present at key moments of a man’s day, week or year, focusing on occasions like ‘getting ready for the day ahead’ or ‘going out on a date.’ These moments matter and they will help you to drive Relevance. By leaning into the daily routine and integrating usage of your product with familiar and relatable activities in a man’s life, you can make yourself indispensable.
**Connection** is all about relatability. It’s about how a brand conducts themselves and whether the target market is motivated to buy based on these behaviors.

**Connection** is a disruptive factor within the cosmetics sector because there isn’t as much of an embedded culture or mass following for men as there is with women. Women have grown up with these products, so it makes sense they already relate to these brands on an intimate level. But men can’t rely on a shared sense of history. To connect with these products and brands, the marketing strategies need to get to the heart of their pain-points, providing solutions to specific problems they face, and using relatable brand ambassadors to hammer these points home.

To grow your **Connection** with men, consider some of these options:

**Normalize the routine**
Play on the key pain-points felt by men in the cosmetics category, of wanting to look fresh and healthy but also not wanting to seem unnatural. Include simple instructions in your communications on how to get a ‘fresh and healthy glow’, focusing on the outcome of the product, while also reinforcing the fact that your products won’t be visibly noticeable by onlookers.

**Tap into partnerships and passion points**
Harness talent and brand ambassadors that look and feel like your audience. Any ad should feature people the user can relate to, so they can imagine themselves in their shoes, wearing the product. Invest in the kinds of influencer marketing that makes people feel more connected to the brand because it embodies the lifestyle and passion points, they too share.

**Challenge stereotypes**
Toxic masculinity is a real thing and brands can face it head on by challenging pre-conceived expectations on gender norms. They can also invest in CSR around real issues facing men today from mental health to self-esteem to show the brand is behaving in a way that these men can relate to on an emotional level.

**Value for Money** is the extent to which people feel that your brand is worth the money that they are paying for it. It’s an understanding of worth. It’s not simply about price.

This Driver may be less expected within the cosmetics category because men don’t see these products as ‘essentials.’ There hasn’t been a strong enough ‘need’ established yet amongst this audience. By educating men on the importance of the everyday routine or on the occasions to use these products, this will help to cement their role within their lives.

To grow your **Value for Money** with men, consider some of these options:

**Focus on the benefit you can provide**
Lead with the benefits of your products. If men are concerned about looking unnatural after using these products, ensure your packaging and communications conveys how minimalist these products are and how discrete they look after application. Establishing the need for your product early on will help to justify its cost.

**Use price tiers to bring in a wider range of consumers**
As a large proportion of men in the UK aren’t concerned about using these products, you can drive mass loyalty by offering a wide variety of product sizes and ranges for this group. Launching new products at new prices – either in bigger sizes or smaller sizes – will increase your brand’s reach, allowing it to play across multiple price tiers.

**Don’t be afraid of sacrificing Aspiration for Value for Money**
Often it can be tempting for cosmetics brands to go down the Aspirational route, creating a product that exudes prestige and exclusivity. The men in this group expect Aspiration from these products, yet Value for Money is almost viewed as an after-thought (and falls within the disruption space). By ensuring your product is cost-effective and widely available for the masses, you will both boost sales and increase your Value for Money. And in a category as competitive as this, it’s always good to do something to stand out.
Attraction: A brand that’s appealing; whether that’s because it looks good or presents itself well. Its physical character draws you to the brand.

Innovation: A brand that does things in new ways. It’s always iterating: developing and discovering original ways of thinking and doing things. This brand has momentum.

Performance: A brand that fulfils its promise. It does so noticeably well. It delivers strongly against what you are expecting from its category.

Clarity: A brand which has clear purpose in your life. You know what it stands for, and what to do with it. There’s no ambiguity about this brand.

Connection: A brand that you respond positively to because of how it behaves. You find yourself relating to the brand. It does things in a way that you appreciate and understand.

Transparency: A brand that is free of pretence and deceit - it doesn’t camouflage its activities. It readily offers up details about itself, so that it is better understood. It makes sure it’s open about what it does and doesn’t do.

Accessibility: A brand that is so easy to use: the experience of it once you have it is uncomplicated and intuitive.

Aspiration: A brand that feels desirable and has something special that you want. The brand gives you an urge to have it, and may also feel exclusive.

Empathy: A brand that is perceptive of you: seeing what it is that you need and want. The brand is sensitive not only to what you want, but also why you want it.

Relevance: A brand that is relevant to you: it meets your needs or wants. What the brand offers has a direct bearing on your life.

Differentiation: A brand that stands out from the crowd. It is in some way unique - through its character, communications or in what it offers.

Integrity: A brand that has principles. It always chooses to do the right thing because of the clear values it holds. The brand behaves honestly.

Popularity: A brand that is loved by many; it is often famous or prominent in the world. It is widely applauded and endorsed, giving it popular acclaim.

Consistency: A brand that shows a steady conformity in all that it does. It has been reliably the same over time, creating a strong reputation; or it is the same across all its products and services.

Familiarity: A brand that you know and feel you know something about.

Value for Money: A brand that is worth investing in.